Interview Summary	Application No. 09/578,508	Applicant(s) MCNAMAR ET AL.	
	Examiner JAGDISH PATEL	Art Unit 3624	

All participants (applicant, applicant's representative, PTO personnel):

(1) *JAGDISH PATEL*. (3)_____.

(2) Chatterjee, Aaron (Reg. 41398) (4)_____.

Date of Interview: _____.

Type: a)☐ Telephonic b)☐ Video Conference
c)☒ Personal [copy given to: 1)☐ applicant 2)☒ applicant's representative]

Exhibit shown or demonstration conducted: d)☐ Yes e)☒ No.
 If Yes, brief description: _____.

Claim(s) discussed: __1__. (Exemplary)

Identification of prior art discussed: Prior Art Applied in rejection of claim 1

Agreement with respect to the claims f)☐ was reached. g)☐ was not reached. h)☒ N/A.

Substance of Interview including description of the general nature of what was agreed to if an agreement was reached, or any other comments: _____. See below

(A fuller description, if necessary, and a copy of the amendments which the examiner agreed would render the claims allowable, if available, must be attached. Also, where no copy of the amendments that would render the claims allowable is available, a summary thereof must be attached.)

THE FORMAL WRITTEN REPLY TO THE LAST OFFICE ACTION MUST INCLUDE THE SUBSTANCE OF THE INTERVIEW. (See MPEP Section 713.04). If a reply to the last Office action has already been filed, APPLICANT IS GIVEN ONE MONTH FROM THIS INTERVIEW DATE, OR THE MAILING DATE OF THIS INTERVIEW SUMMARY FORM, WHICHEVER IS LATER, TO FILE A STATEMENT OF THE SUBSTANCE OF THE INTERVIEW. See Summary of Record of Interview requirements on reverse side or on attached sheet.

The applicant proposed amendment appears below: claim 1 would be amended to explicitly recite linking the investment component to the loan component and the step of associating an investment asset to the investment component will be based on the linking of the loan component to the investment component.

AU. 3624

Examiner Note: You must sign this form unless it is an Attachment to a signed Office action.

Primary Examiner's signature, if required

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